Florida Department of Transportation

Trns•port PES

Project Development Guide

(Production)

Table of Contents

Introduction

This User Guide describes the procedures involved in establishing and maintaining projects in the Trns•port Proposal and Estimates System (PES) for contracted work.

This User Guide complements the Reference Manual for Production Projects, and is reduced in scope to be a quick reference of steps in creating projects for construction contracts.

This Guide focuses on bringing projects into PES by using the copying approach in conjunction with the interface program to the Financial Management (FM) system, and using the Project Tabbed Folder technique for adding and changing project detail.

It should be noted the Official Estimate for non-Maintenance projects/proposals is confidential and not meant for viewing by any role not containing the confidential token. The Proposal General Tab in PES contains an "Official Estimate flag (checkbox) which must be checked by District Estimates staff when development of the Official Estimate begins. When this flag is checked the Estimate Dollar amounts are not available for viewing by roles that do not contain the confidential token. This restriction also includes all reports and processes that are associated with the Official Estimate. The Control Group for Projects and Proposals that have this confidentiality invoked will contain "OEST" in the Control Group field. Additionally, the Project and Proposal List screens have columns indicating whether the Official Estimate Indicator is checked.

Appendix A shows the structure of Access Control Group.

Creating and Managing Projects

Adding and Changing Projects

Adding projects into Trns•port PES should be thought of as involving two steps. The first is to create a project header, and the second is to add the project detail.

This Guide focuses on bringing projects into PES by using the copying approach in conjunction with the interface program to the Financial Management (FM) system, and using the Project Tabbed Folder technique for adding and changing project detail. See the Reference Manual for Production Projects and Proposals for more discussion on procedures.

Lump Sum Contracts

For projects that are to be let as Lump Sum contracts, duplicate projects and proposals will be created to track project and proposal detail. These tracking projects will be set up one for one for the proposal and all projects attached to it. Tracking Projects will be identified by a thirteen character ID. The first eleven will be the regular *Financial Project Number* plus the two characters **LS.** These tracking projects will be fully defined with pay items, quantities, prices and all other details of a regularly let project.

The Tracking Proposal IDs will be seven characters in length. The first five will be the regular **Contact ID** plus the characters **LS**. A representative contract number would be T3052LS or E2G53LS. After the regular projects and proposals are created and synchronized with the Financial Management System (FM), the tracking projects and their proposal header may be created with the copy special feature.

No other duplicate projects or proposals are to be added to the production environment of Trns•port, as they will produce quantity errors in some of the reports

The Project Header

To create a project header from scratch:

- Access the Project List window.

- Place the cursor anywhere in the white space.

- Click the right Mouse Button.

- Click **Tabbed Folder Add**.
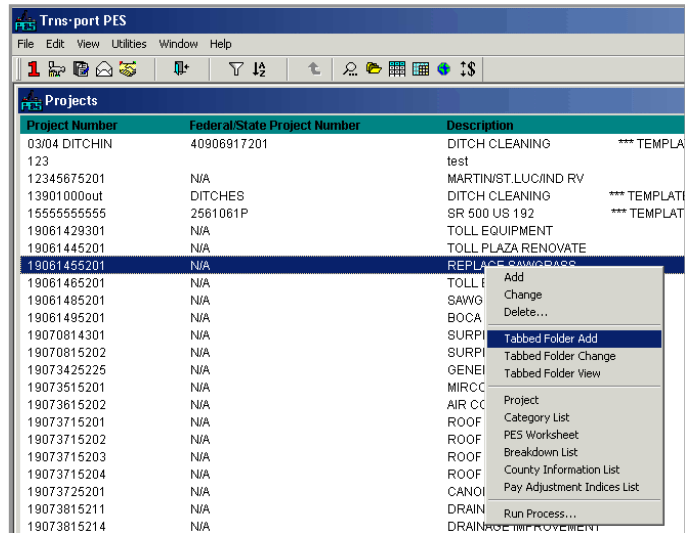
The resulting screen will show page 1 of the General tab of the project header.

Enter the minimum amount of information to satisfy Trns•port system requirements, and then save the project.

Proceed to enter data in page 1 of the general tab for the following six fields:

Project Number	*Description*
Control Group	*District*
Project Type	*Project Work Type*

Other fields may be left at their default values. None of the fields on page 2 need

be filled now

- Save the project by clicking the **Save** Icon.

When these six fields are completed, run the FM transfer program and all of the remaining fields will be filled, and the *Description* will be updated.

Entering Project Detail from the Financial Management System (FM).

The FM Interface was created to both create and refresh financial and Work Program information in Trns•port PES. The refresh feature of the interface runs every night and updates fields in all projects in PES possessing valid FinProj Numbers. See the Trns•port Reference Manual for Production Projects and Proposals. for a full discussion on running the interface for new projects and to refresh projects.

To run the FM Interface program:

- Enter TSO and get to the ready prompt.

- Type **TSM** for production environment. Press **<Enter>**.

- Enter **B** at the Trns•port Interface screen. Press **<Enter>**.

- At the Add/Refresh screen.

   o Enter one **FinProj** number per line.

      ▪ For the first line, enter **A** (for SEL)

      ▪ Enter **01** (for CARD ID)

      ▪ Enter all 11 digits of the **FinProj Number**.

      ▪ Press **<Enter>.**

   o To add another project,

      ▪ Enter **A** (for SEL)

      ▪ Enter **02** (for CARD ID)

      ▪ Enter all 11 digits of the **FinProj Number**.

      ▪ Press **<Enter>.**

- At the Job Card Information screen, enter a **printer ID, your name,** and **telephone number**. Press **<Enter>** for the next screen.

- At the Trns•port Interface screen, enter option **X** to end. Press **<Enter>**

- At the TSO screen enter **logoff** and press **<Enter>** and Exit TSO.

- A report will go to the printer you designated when the FM Interface has completed.

When the FM Interface completes, the projects will appear in the Projects List window. (If your Projects List window is open, you will have to refresh it by closing it and reopening it before your new project(s) will appear.) If the interface ran with no pre-existing data in PES, these new projects will contain an Access Control Group that is accessible to your district. If it ran as an update, the control group you entered will not be changed.

Adding and Changing Project Information

To change information that comes from the FM system, contact your district work program office to make project information changes in FM, and the nightly refresh will make the Trns•port data match.

From the Projects List window,

- Rclick the desired **Project**.
- Click **Tabbed Folder Change**.
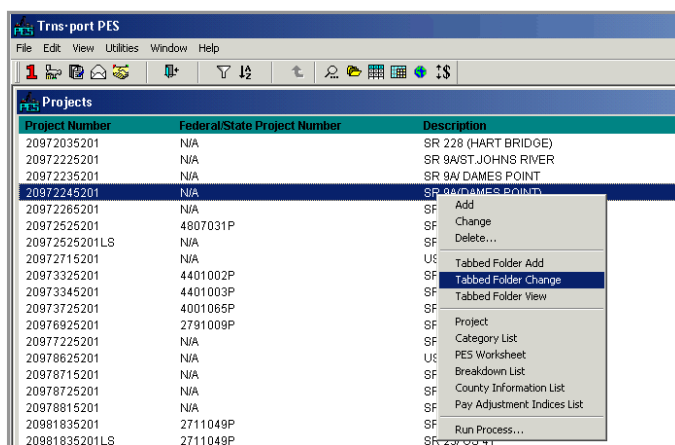
General Tab

Here the **Project Numbe**r is blue, and is the **Finproj** number from the FM system. This project has status 014, where right-of-way acquisition has begun, from FM.

The General tab page 1 entry screens are seen here.

General Tab page 1

Note the Control Group of CD02W555. This Control Group indicates a production project under control of district 2, and the W555 extension identifies a particular consultant firm. For a new project, the initial Control Group will be of the form CD0?, where the ? should be replaced by the Managing District number. The FM system will make that initial assignment. Someone with proper authority, in the district office, must change this Control Group to assign the project to a particular person or group.

General Tab page 2

The following six fields are filled automatically by Trns•port or by the FM System.

Estimated Amt of Project	*Type of Road*	*Longitude of Midpoint*
Latitude of Midpoint	*Work Mix*	*Proposed Letting Date*

❖ *Note:* The *Estimated Amt of Project* field is filled when you run the process **Generate Preliminary Detailed Estimate.** This process will be run several times over the project life. It must be run after the final **Engineers Estimate** for historical purposes. When the contract transfers to SiteManager and DSS this field transfers as the **Engineers Estimate**.

Counties Tab

To view the Counties,

- Click the **Counties** Tab.

The Counties tab contains the *County Number* and the *County Name* of the counties to which the project is associated. Countywide and Statewide are valid entries. This screen shows that 100% of the project will be in County 72, Duval County. If a project is in more than one county, and that information is in the FM system, the proportioned information will appear in this table.

If another county needs to be added,

- Rclick anywhere in the white space of the screen.

- Click **Add**.

Be sure that County information is accurate in the Work Program. The Work Program/FM data will overwrite information that is manually entered in PES. If necessary have Work Program correct the inaccurate data that is in the FM System.

The screen will appear with one blank row added and ready for data. Add any additional rows to the window so that there are as many rows as there are counties associated with the project.

> *County or Congressional District*
> *County Name*
> *Percent of Project Length*

Categories Tab

In addition to Category 0000 for funding, there is one other category.

Where a project is to have more than one bridge, add categories so that the number of structures categories is equal to the number of bridges. The first bridge in a project is assigned to category 0100. Additional bridges are to be assigned to category 0101, 0102, 0103, etc.

Add a Category

To add a Category,

- Rclick in the center white space.

- Click **Add**.

There will be a blank row in the center section of the screen and a detail area at the bottom.

- Enter the *Category Number*.

On an initial run of the FM interface, a full set of *Category Numbers* and titles will be provided for use in adding pay item detail.

Choose from the following list. These categories align with the Department's standard Design Groups:

0100 STRUCTURES
0200 ROADWAY
0300 SIGNING
0400 LIGHTING
0500 SIGNALIZATION
0550 INTELLIGENT
    TRANSPORTATION SYSTEM
0600 LANDSCAPING
0700 ARCHITECTURE
0800 UTILITIES

0900 MASS TRANSIT

Categories Tab page 1

- Complete the following fields for each category:

If the category is a bridge, include all of the structures fields listed.

❖ Note that the Structure Work Class code table no longer has the value "**01**". Select the proper value from the table.

Category Description	*Federal Construction Class*	*Bridge Work Type*
Combine w/Like Categories	*Category Length*	*Structure Work Type*
Category Width	*Bridge ID*	*Bridge Length (Ft/M)*
Bridge Width (Ft/M)	*Bridge Type*	*Number of Span*

Categories Tab page 2

- Click the page 2 radio button to display the remaining fields.

Certain information contained on the general page has been repeated here (e.g., Termini, Stationing, and Road Section Number). It is not required that all categories reflect the same overall information.

Unit Number Not in use at this time. The default value is 000. **Do not change this value.**

If the category is a structure complete the four following fields from values in their respective drop down boxes.

Super Structure Type
Substructure Type

> *Foundation Type*
> *Structure Location*

When category information is complete,

- Click ADD MORE to enter information for another category.

- Click OK to finish adding category information.

- Click CANCEL to return to the Categories List window without saving the new record.

Alternatively, enter category numbers and titles by using the Copy Special function.

Delete a Category

To delete a category,

- Rclick the **Category**.

- Click **Delete**.

The category will be removed from the screen and from the Trns•port database when the project is saved. Continue deleting categories that are not required. **You may keep "empty" categories in the database while you are creating a project, but you will not be able to run all reports and processes with these "empty" categories**. Prior to processing a proposal, delete all unneeded categories.

Funding Tab

Project personnel will not be able to add, delete, or change funding information. Except in the rarest of circumstances, the Funding Tab will be like this one and show Fund Code **PART**

Pay Adjust Tab

The payment adjustment features of Trns•port are not in use at this time.

Breakdowns Tab

The Breakdown ID is needed on the Worksheet but otherwise this tab will not be used. Ignore this tab.

The Worksheet Tab

Since the FM system has no Item data, most of the work will be in this Worksheet tab entering

Items and quantities. As can be seen, there is only gray space where Item information is to reside. Begin by entering blank rows to hold the Item data. Create the first row by,

- Rclick in the gray space.

- Click **Add.** This creates one row.

For additional rows,

- Rclick in the grid.

- Click **Insert Row** to add the number of rows you need.

Begin entering Item data on a row by:

- Selecting the *Category Number* to which the Item belongs. Choose from the list box at the bottom of the screen in the Category Number column.

The Worksheet contains 29 fields displayed as columns. The following are required:

- Complete the following fields for each category **as appropriate**.

Breakdown ID	***Breakdown Item Line Number***	***Breakdown Item Quantity***
Category Number	***Combine Flag***	***Estimated Unit Price***
Pre-Established Price	***Item Number***	*Item Alternate (Alt Code)*
Price Lock Flag	***Project Item Line Number***	*Do Not Bid*

Some columns, such as **Category Number** and **Item Number**, have list boxes at the bottom of the column. Click the arrow to view supporting reference data and select appropriate values. Filter and sort data to find the information needed. If a column does not have an arrow displayed at the bottom, enter values directly into the fields. You must enter information for the 11 required
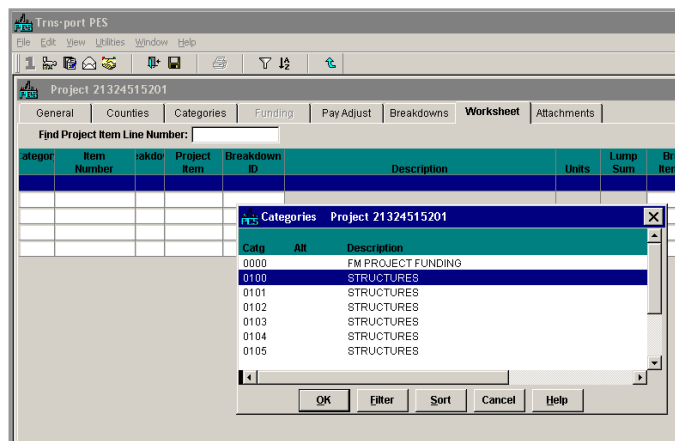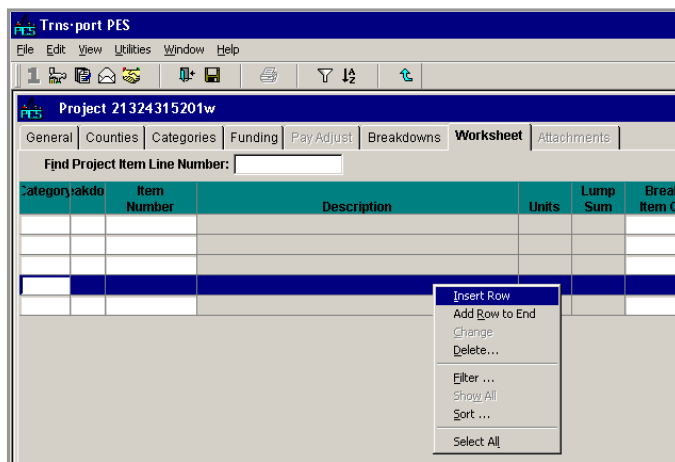
fields in the Worksheet. See the Reference Manual for Production Projects & Proposals for more information on adding rows.

Entering Data in a Range of Cells

Use the **Edit > Range Fill** command from the Menu Bar to enter values in columns. If you add or change information in a column and other rows in the same column should contain the same value, select all cells in the column and copy the value down or up in the column. Range Fill is a quick way to enter *Category Numbers* or breakdown numbers multiple times. You enter the value once and then copy the value in all related records.

To select an entire column,

- Click once in the column title.

    - Click **Edit > Range Fill** > **Fill Up.**
    Or

- Click **Edit > Range Fill** > **Fill Down** from the Menu Bar. Trns•port populates all the selected fields with the value from the first cell.
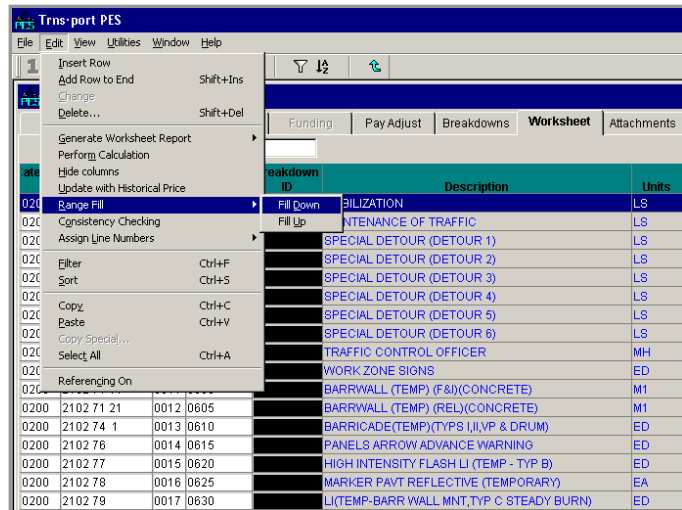
Checking Data Consistency

Check the consistency of data in the Worksheet before you are ready to save it. To do this:

- Click **Edit > Consistency Checking** from the Menu Bar.
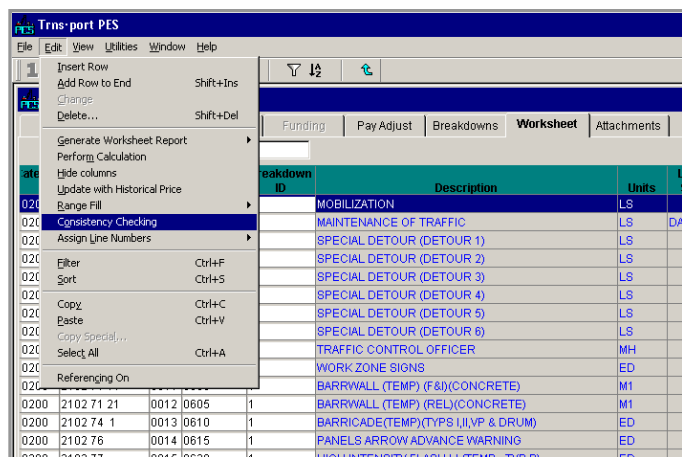
Identifying Obsolete Items

One of the tests made during the Consistency check is for obsolete *Item Numbers*. If any are found, you will be required to change the Items to current values before the project will successfully save.

Assigning Line Numbers

Assign line numbers to all rows before saving the Worksheet. From the Menu Bar,

- Click **Edit > Assign Line Numbers > Project Items**.

- Click **Edit > Assign Line Numbers > Breakdown Items**.

This numbers all **Project** and **Breakdown Item** sequence numbers.
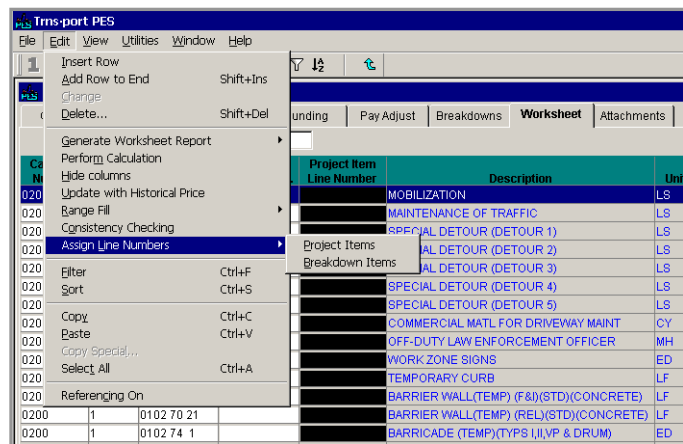
When completed, the Worksheet will be similar to this one.

- Save the new project to the Trns•port database by clicking the "**X**" to close the window,

    Or,
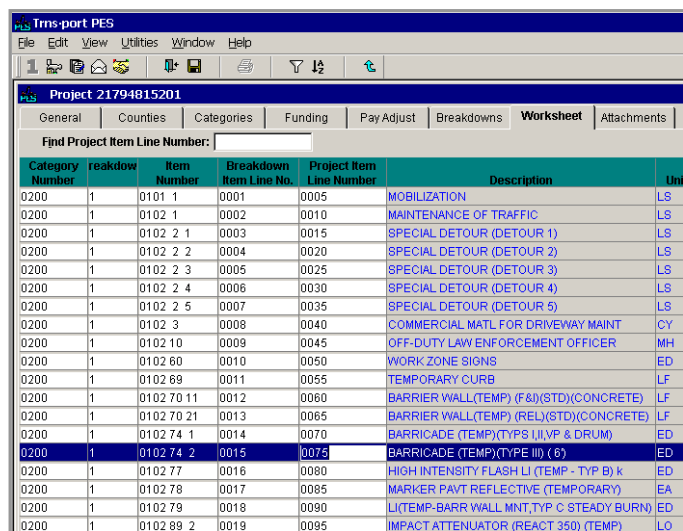
- Click the **Save** icon on the Button Bar.

❖ **Warning**: During the development life of a project, Items will likely have been both added and deleted. Prior to transferring the proposal to the Contracts Administration Office for bidding run the Assign Line Numbers and Project Numbers one last time to eliminate gaps in number sequence. This will greatly ease administration of the work after transfer to SiteManager.

The Attachments Tab

All of the Trns•port tabbed folder windows have an Attachments tab. It allows you to integrate OLE-compatible documents (for example, letters or spreadsheets), web pages, and plug-in applications into Trns•port. At this time there are no standards established for use of this feature.

Deleting a Project

To delete a project,

- Highlight the project in the Projects List window

- Select **Delete** from the right mouse button menu.

Trns•port displays a series of two Delete Warning windows and a Confirm Delete window. Authority to delete projects is restricted by security controls. If you are not able to delete a project, see your District Application Manager.
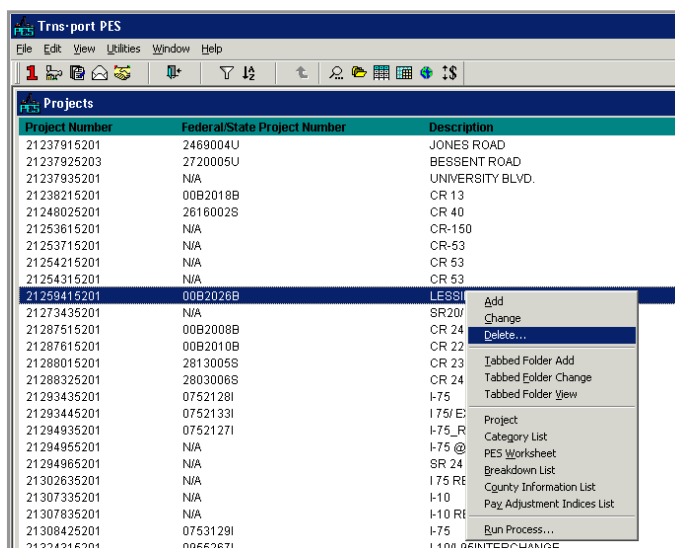
The Item Detail Screen

At times it will either be desirable or necessary to enter some Item information into the Item Detail Window. See the Reference Manual for Production Projects for details on this process.

Before using this procedure, be sure that you have properly saved your project in the Folders formats to the database and exited the project.

To access the Item Detail screen, take the following steps:

From the Projects List window,

- Rclick the project of interest.

- Click **Category List**.

- Click the **Category** of interest.

- Rclick **Project Items List**.

- Click the **Item** of interest.

- Rclick **Change**.

The Item Detail window will open. You may change any field on the screen except those that are in blue. When you have completed your changes,

- Click **OK** to save the data and close the screen.

- Close the Item list window.
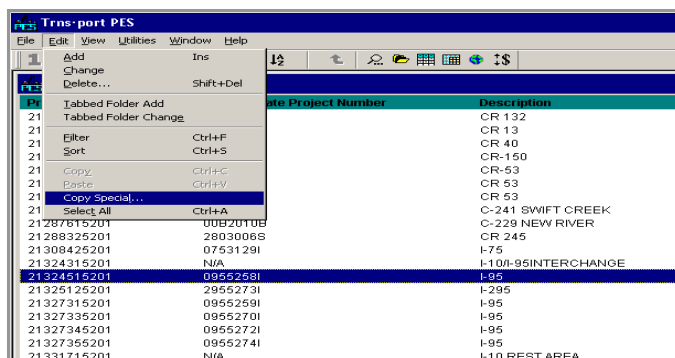
- Close the Category list window.
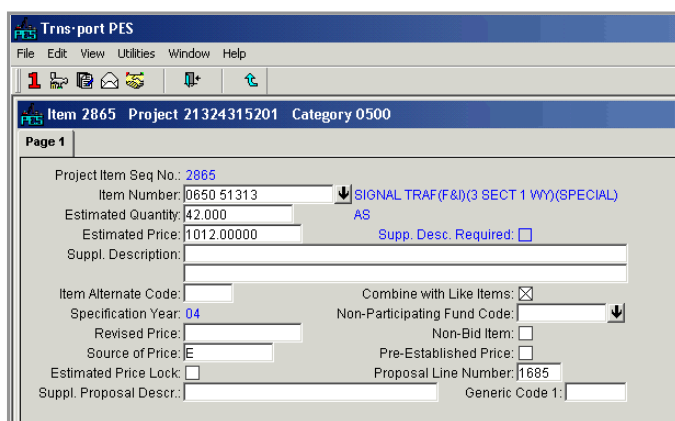
The Copy Special Feature

The Copy Special feature allows you to copy one project to another or to copy the category detail of one project to another project.
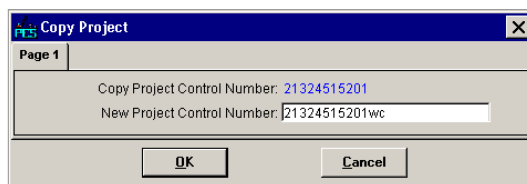
Duplicating a Project

To initiate a Copy Special for a project:

- Click the **project** to copy in the Project List window.

- Click **Edit > Copy Special** from the Menu Bar.

- Enter the new *Project Control Number*

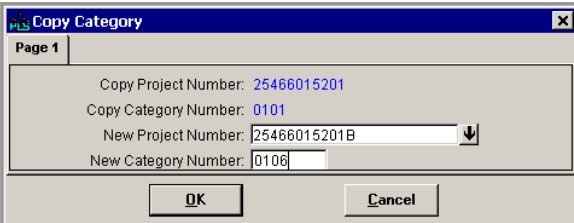- Click **OK**.

Duplicating a Category

The Copy Special option also allows you to copy a category and its Item information from one project to another, eliminating the need to re-enter all the data for each new category.

- Click the source **project** in the Projects List window.

- Rclick **Category List**.

- Click the category you wish to copy.

- From the Menu Bar, Click **Edit > Copy Special**.
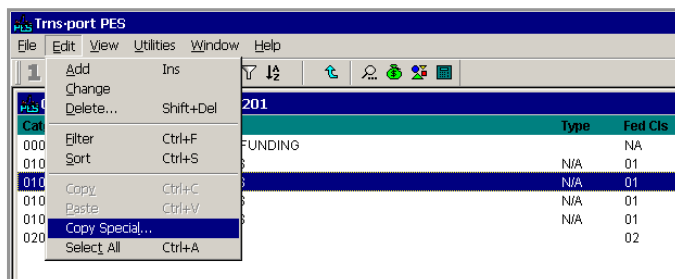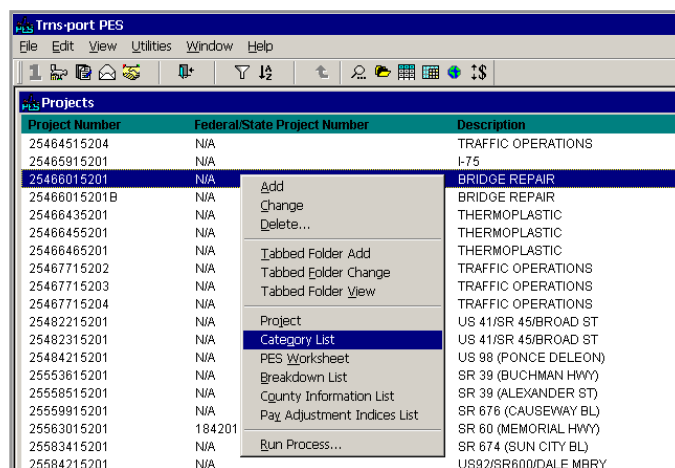
The system will default to the same Project Number. This would apply if you had created a Category and wished to duplicate it in the same project.

- Click the *New Project Number* from the list box.

- Enter the destination Category Number as the *New Category Number* to copy the category items to the new project.

After you copy the category, enter necessary modifications to the new category. Copy Special copies the category header, Item records, quantities, and price information that exist in the source project and/or category.
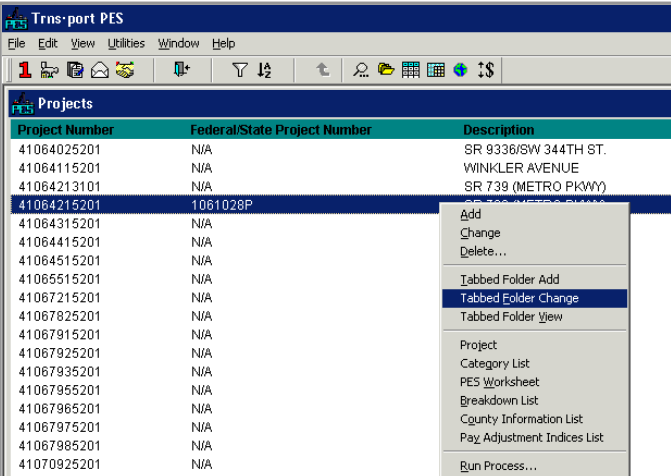
Combining Projects

Combine two or more projects into a single project as follows:

- Click the host project in the Projects List window.
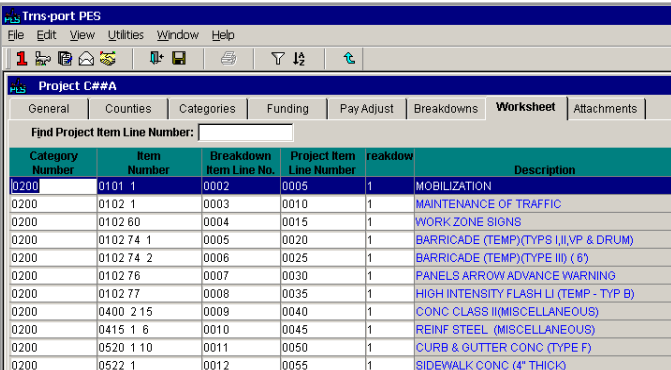
Trns•port will keep the header from this project and add categories and pay items from other projects to it.

- Click **Tabbed Folder Change** to open the project.

- Click the **Worksheet** tab to open the Worksheet for the selected project.

Note that in this case, there are pay items displayed, but in another situation, there may not be. A view of the category tab of this project would reveal that all necessary category numbers exist.

From, the Menu Bar,

- Click **File > Import > Combine Projects**.

Trns•port displays a list of projects. Use the Filter and Sort options to help you locate projects to combine. You must only combine projects which have the same *Spec year* and same unit system.

- Click a **Project** to combine

- Click **OK.**

Trns•port returns you to the Worksheet where it loads data from the selected new project to the original project Worksheet.

If you want to combine another project with the first project, repeat these steps for each one.

When all projects have been combined, re-run the Assign Line Numbers process for both Project Line Numbers and Breakdown Line Numbers.

Running Processes and Printing Reports

It should be noted the Official Estimate for non-Maintenance projects/proposals is confidential and not meant for viewing by any role not containing the confidential token. The Proposal General Tab in PES contains an "Official Estimate flag (checkbox) which must be checked by District Estimates staff when development of the Official Estimate begins. When this flag is checked the Estimate Dollar amounts are not available for viewing by roles that do not contain the confidential token. This restriction also includes all reports and processes that are associated with the Official Estimate. The Control Group for Projects and Proposals that have this confidentiality invoked will contain "OEST" in the Control Group field. Additionally, the Project and Proposal List screens have columns indicating whether the Official Estimate Indicator is checked.

Project level reports

One of the most useful reports is the Preliminary Detail Estimate. It may be run at both project and proposal levels. Its value is that it contains all of the structural detail of the project or proposal with line numbers, sections, categories, items, and quantities. Trns•port also summarizes the estimate with subtotals in several formats.

To run project level reports, begin at the Project List window**.**

- Highlight the project(s) for which you want to generate reports in the Projects List window.

- Rclick **Run Process**.
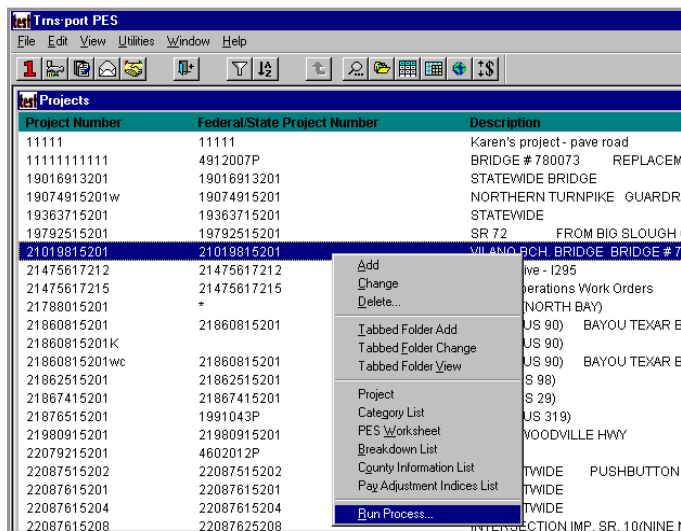
This will display a list of processes that are available at the project level.

Here is a sample list. Your security authority may not permit you to run all of the processes available in the system.
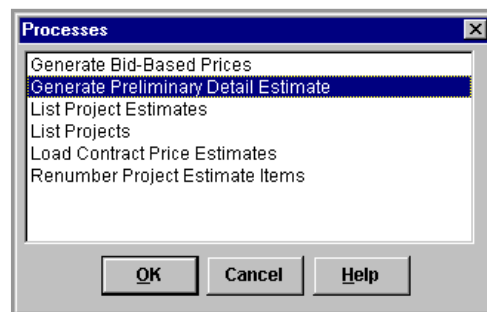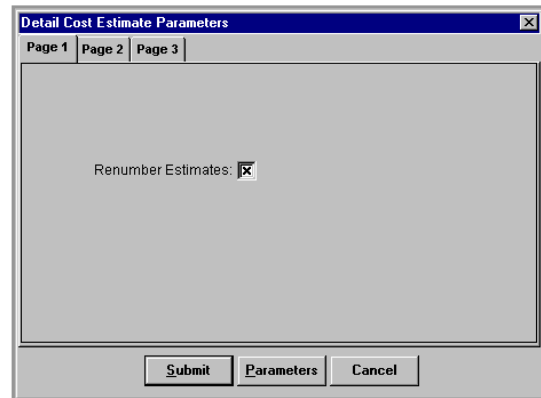
- Click **Generate Preliminary Detail Estimate**.

- Click **OK.**

Trns•port displays the Detail Cost Estimate Parameters window.

You will see the parameter selection window, which has three pages. Page 1 shows a default selection to renumber the Item line numbers

- If you do not want to renumber them, turn off the "**x**".

- Click the Page 2 button.
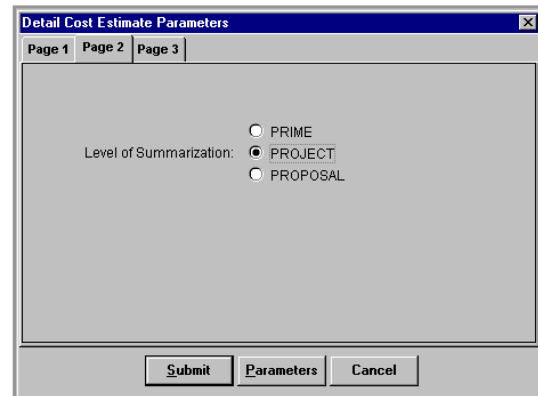
You must enter the level of summarization on Page 2. This option determines whether you run the Detail Estimate for a project, prime project, or proposal. The Department is not using prime projects.

- Click the Project level of summarization,

- Click the Page 3 button.
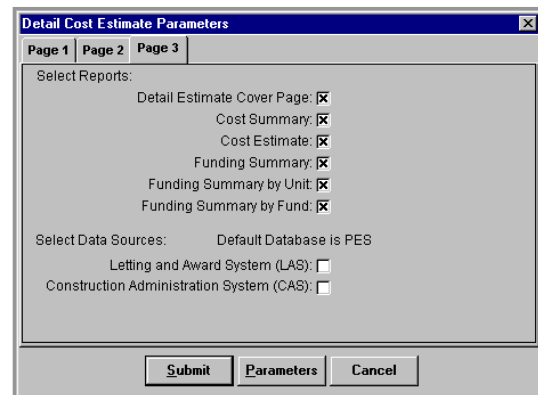
Page 3 shows the Parameters window, which allows you to select the reports you want to produce.

- Click the boxes of the reports you want to generate.

- Click **SUBMIT** to run the process.

- Click **PARAMETERS** to change process submission parameters.

Or

- Click **CANCEL** to return to the Projects List window without running a process.
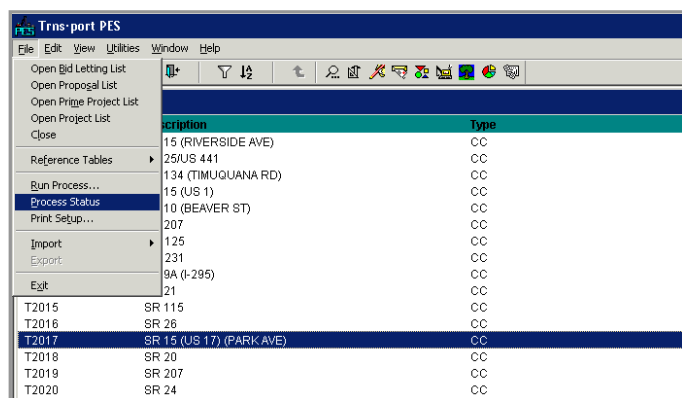
Process Status

To see the results of this process,
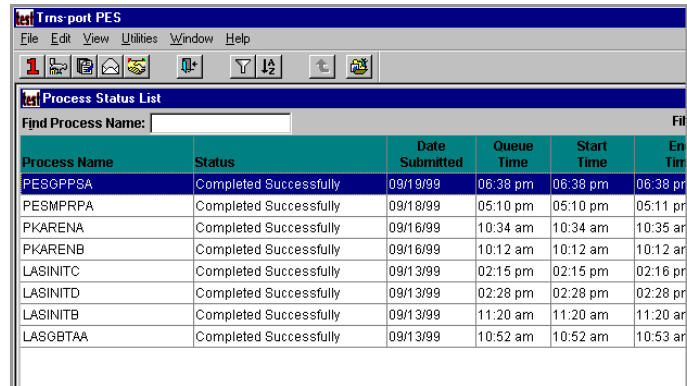
- From the Menu Bar, Click **File > Process Status**.

This screen lists all of the processes you have recently run.
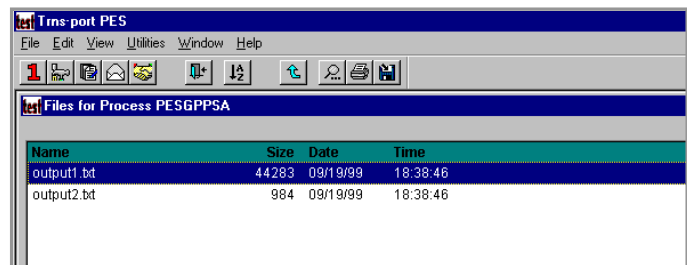
- DblClick on the blue band of the report you just ran (check the date and time columns).

To access the reports,

- DblClick the report **OUTPUT1.TXT** and review your report on screen.
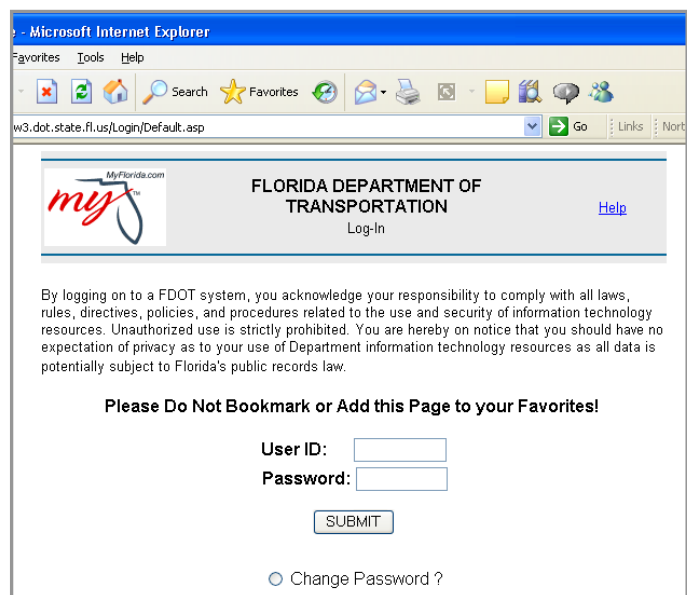
Web Reports

In addition to standard reports within PES several reports have been created that are accessible from the FDOT Intranet. At the URL:

https://www3.dot.state.fl.us/TrnsportReports/default.asp

this Log In screen opens.

- Enter your user ID and Password

You will see a list of **Designer** and **Pre Letting Reports.** Depending on your access security, you may have a different list.

Project Edit Report

If you select the Project Edit Report, you will get another login screen.

- Enter a **FinProj Number**
- Click **Submit**
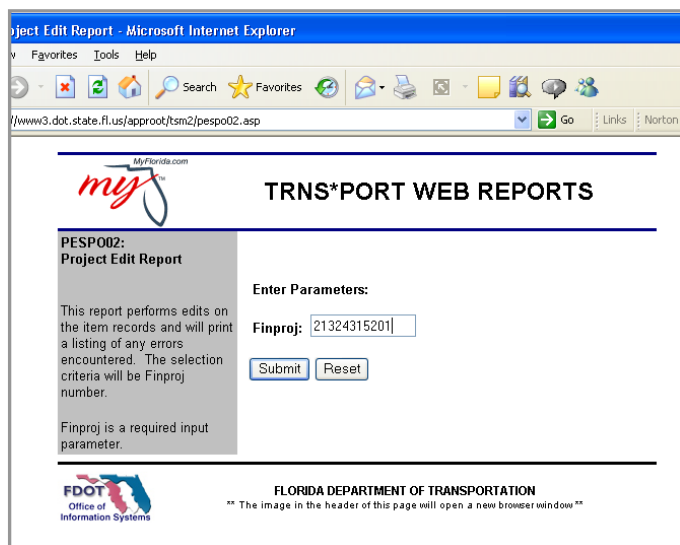
A report in Adobe PDF format will be generated such as this one which was 16 pages. Note that two Items are identified as Obsolete.

Cross Walk Report

The crosswalk report is a search tool to find related information from one known item. In this example a search of all Proposal IDs on a particular letting (03041021) is sought.

This report is the result.
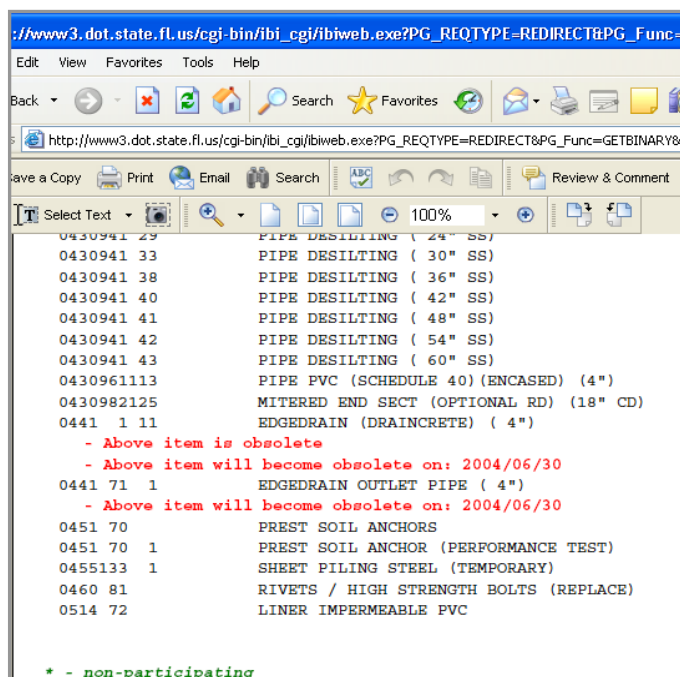
Appendix A   Control Group

The assignment of Access Control Groups is one of the principal tools available to the Department to control access to project data. Through the plan outlined here, a hierarchy can be established where data may be compartmentalized to restrict access to a set of people who need visibility of a particular project and to deny visibility to those who don't.

The use of Control Groups satisfies two concerns. The first is to reduce the volume of information that will appear on Project List screens, and second to secure information during the bidding and award process. The use of Control Groups allows the visibility of projects to be moved from one person to another. An example would be a project in District 2 that might have a Control Group of CD02PMA. With this Control Group assigned to the project, the District Estimator(s), having a personal Access Control Group of CD02*, would always have visibility of the project. Similarly, any person having an Access Control Group that is less restrictive would also be able to see the project on his or her project list screen. For example, a user with an Access Control Group of C* would have access to every project in the Production organization statewide.

For the management of projects for Central Office letting, the sequence of Control Groups assigned to the Projects and the Proposal Header when it is created, would be as follows:

- CD02PMA: When under the control of a District Project Manager.

- CD02: When control of the project shifts from the Project Manager to the District Estimator.

- CC02OEST: When the District Estimator transfers the proposal to the Central Office for letting. A further refinement here will be decisions in the Central Office Estimates Office about compartmentalizing within itself. For example, a particular estimator may use CC02TW (initials) to assign the access to another estimator, or CC02A to have proposals shared by two or more Estimators as a group within the overall estimates office.

- CT02OEST: When the proposal is ready for processing by the Central Contracts Office. It is necessary that the proposal Control Group remain unchanged while the project is in LAS and the Contracts Office in order to ensure that the Engineer's estimate is always under the control of only the estimator.

The following table illustrates how visibility of projects to a community (Maintenance or Production) for oversight is granted, and then to a smaller group of project or maintenance staff for the control and management of project detail.

	PES	LAS
District Contracts Manager	?L##*	?L##*
District Contracts Assistant A	?L##A*	?L##A*
District Contracts Assistant B	?L##B*	?L##B*
District Estimator	CD##*	CD##*
Assistant District Estimator	CD##A*	CD##A*

	PES	LAS
District Production Director	CD##PM*	None
District Production Project Manager A	CD##PMA*	None
District Production Project Manager B	CD##PMB*	None
District Project designed by Consultant Firm	CD##T###	None
District Maintenance Engineer	MD##*	None
Assistant District Maintenance Engineer A	MD##A*	None
District Maintenance Contract Estimator	MD##*	MD##*
Assistant District Maintenance Contract Estimator	MD##A*	MD##A*
District Work Program Manager	?D##*	None
Central Maintenance Manager	M*	None

Control Group Structure:

Character position 1:	M = Maintenance Project
	C = Construction Project
	Other characters may be assigned if desired to segment project development to other specialty areas.
Character position 2:	D = District Office processing
	C = Central Office processing
	T = Central Contracts Office
	L = District Contracts Office
Character positions 3 & 4:	District Number
Character position 5:	The letters T, U, V, W, X, Y, and Z are reserved for Central Office and statewide use. When a consultant firm is the designer of a project, the last four characters of the control group will identify the consultant firm. The letters T, U, V, W, X, and Y identify consultant firms.
Character positions 6/7/8:	Organizational or subordinate breakout where desired. For consultant firms, these three characters, in conjunction with a letter in character position 5, identify the firm.

A project created and managed in the Central Office could be assigned an office code.

The Control Group feature is a very important tool, but it has limitations:

- It is not a code table and, therefore, will require a thorough understanding of the structure by Application Managers and Security Coordinators.

- Control Group is not available to Letting Headers.

- When transferring a project or proposal to another user, care must be taken to ensure that all letters in the new Control Group are capitalized, and that a valid Control Group has been used. If these precautions are not taken, a project or proposal will be removed from the project or proposal list screen of the previous user and will be available to no one. Under this circumstance, a user with high-level authority such as a Security Coordinator or Application Manager will have to find the errant project or proposal and assign a valid Control Group to it.

Control Group Life Cycle

A Control Group assigned to a project/proposal might evolve in the following manner:

Construction Project

Receive Production Project from FM	CD##
District reassigns project internally	CD##A (or other subset)
Or	
District reassigns to consultant firm	CD##T365 (or other subset)
Pass file to District Estimator	CD##
Create Proposal Header	CD##
Pass to District Contracts office	CL##OEST
Contracts Office processing	CL##OEST (or subset if desired)
Pass to Distr Estimator for Bid Analysis	CD##OEST
Return record to Contracts office	CL##OEST
Complete award and execute phases	CL##OEST
Or for Central Office let contracts	
Pass file to District Estimator	CD##
Create Proposal Header & Price Job	CD##
Pass to Central Estimator	CC##
Pass to Central Contracts Office	CT##OEST
Pass to Central Estimator for Bid Analysis	CC##OEST
Return record to Contracts office	CT##OEST
Complete award and execute phases	CT##OEST